



User Manual

for

Portal Appointment / Booking / Schedule System

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Date: 23rd October 2005
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ACCEPTANCE OF CONTENTS

The undersigned hereby accept the contents of this document as defining the Trial Balance Ledger module.

| REPRESENTATIVE | ORGANISATION | DATE | SIGNATURE |
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PREFACE

Scope of this document

This document explains the functionality and setup of Booking / Schedule / Appointment sub system on the portal.

Audience

This document is intended for:

- The AMC CIT business personnel for approval.
- Portal Users

Related documents

None.

Definitions

- Customer Number: Reference linking the Customer to all related sub systems
- Card Number: Loyalty customer card number
- Sales - Sales information loaded from POS to the portal.
- PC or notebook that will interface via a browser
- POS - Point Of Sale System

OVERVIEW

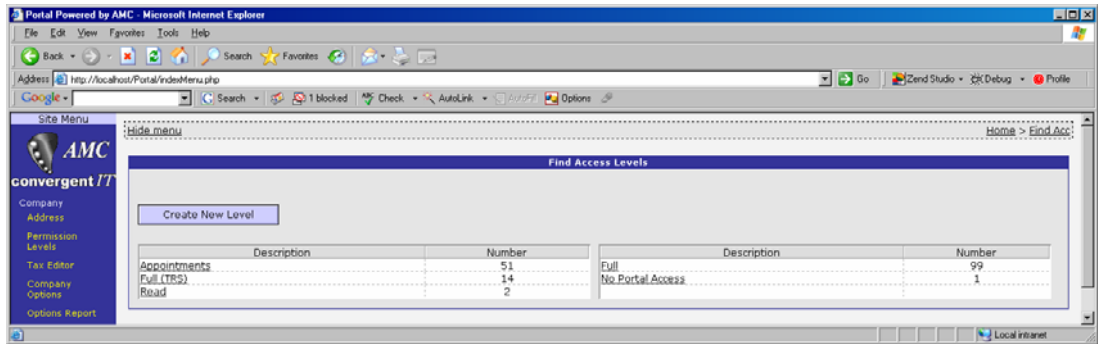
General overview

The Schedule sub system allows services to be 'booked' at the POS, with history being kept of all bookings and work done during the booking.

The portal will include non-editable data history, with the POS doing all editing, creation and deletions. Setup of services and assignment of users to each 'schedule' is all via portal edit screens. At startup of the POS process, the setup parameters will be downloaded, allowing the POS to be self-maintaining.

Security

User access to the reports is controlled via the normal Portal access methods. A user may be entitled to view or edit the Customer Address records, and or change the settings for the schedule or users associated to each schedule. The Company administrator sets the required privileges via the Portal user maintenance screens.



Hardware used

Hardware may be a normal PC or laptop running any standard Internet browser. If using Internet Explorer it must be version 6 or greater. In the case of Firefox it must be version 1.0.4 or greater.

User interface

Standard portal navigation and login is used.

Business process

The portal receives transactions from the POS, with an internal indicator and details for the customer Appointment(s).

The functionality of the Portal is to support known customers, from Lay Buys, Loyalty, Debtors, Customer Orders and Home deliveries, allowing quick access for the POS to assign the appointment or booking. The POS also allows generation of new customers.

Portal reports allow for historical reporting and control of services and appointment 'books'.

Reports

Purpose

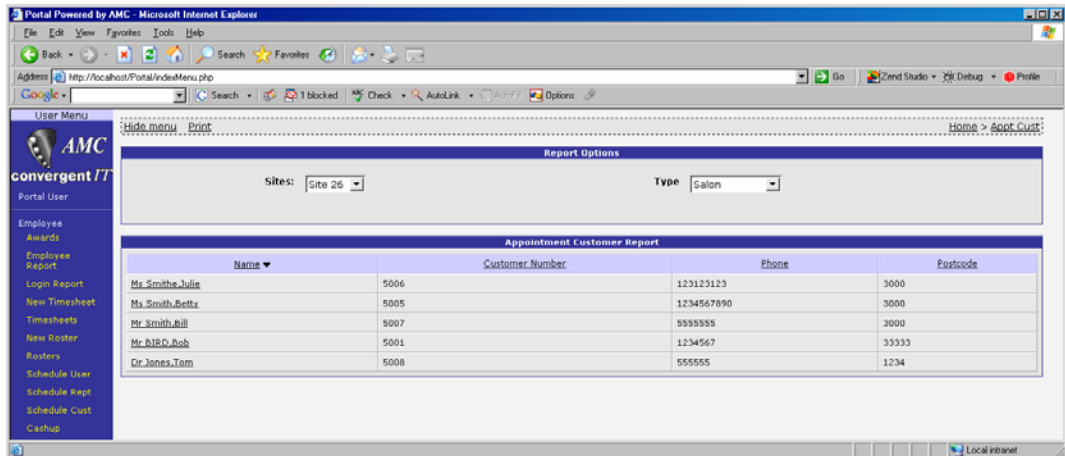
To report on Appointment Book activity given a users selection.

Type of reports

Portal reports available.

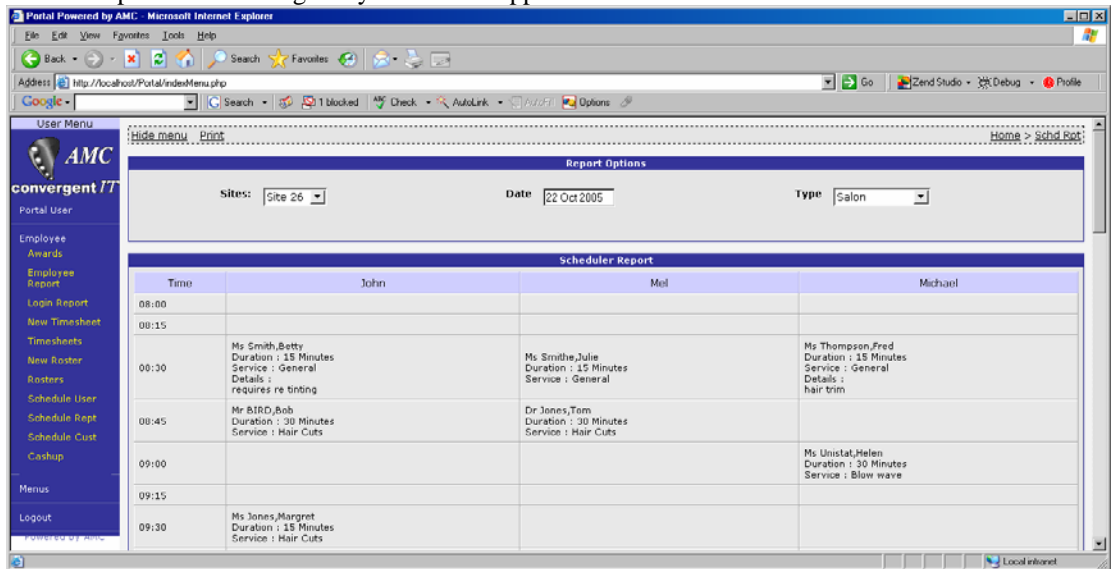
1. Customers

This report allows all previous customers that have used the Schedule / Booking system to be reported on.



2. Appointments

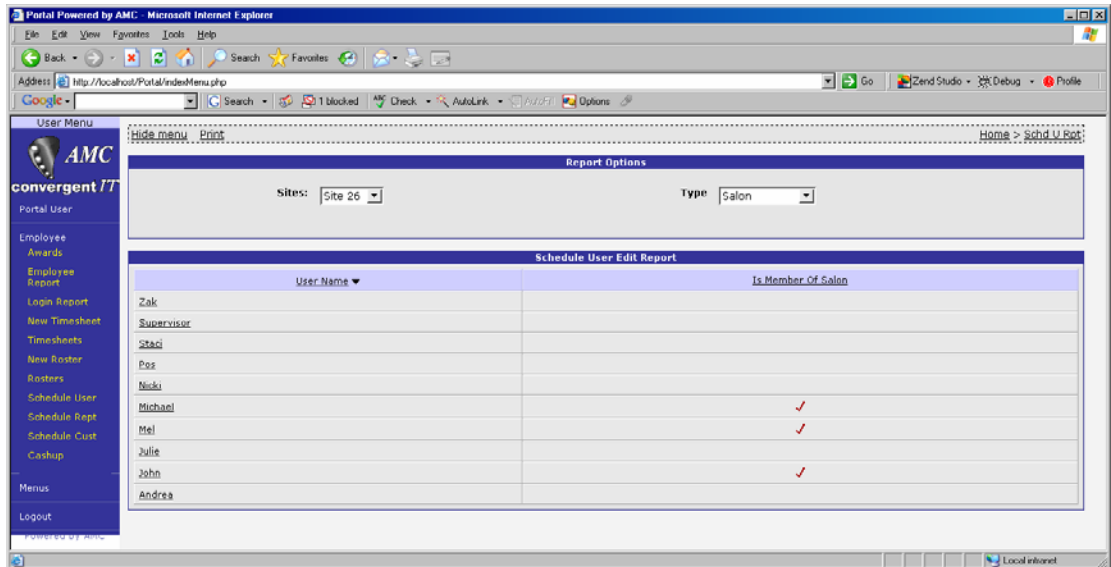
The report allows a single day view of all appointments for the selected 'book'



The report is self-configuring, the columns shown depending on the Employees assigned and the start and stop times as per the system settings. (See maintenance)

3. Employee Allocation

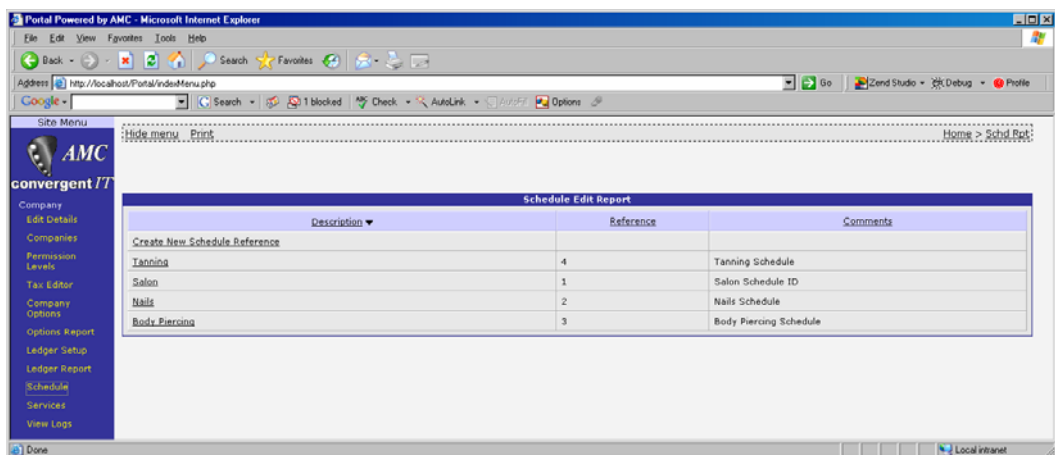
This report is both maintenance and report. It allows the user to add or subtract employee from a 'book'



By clicking on the employee name, the choice of adding or removing is offered depending on the current status. If the employee is already assigned (indicated by a red tick) then the offer will be to remove.

3. Schedules or Book Report

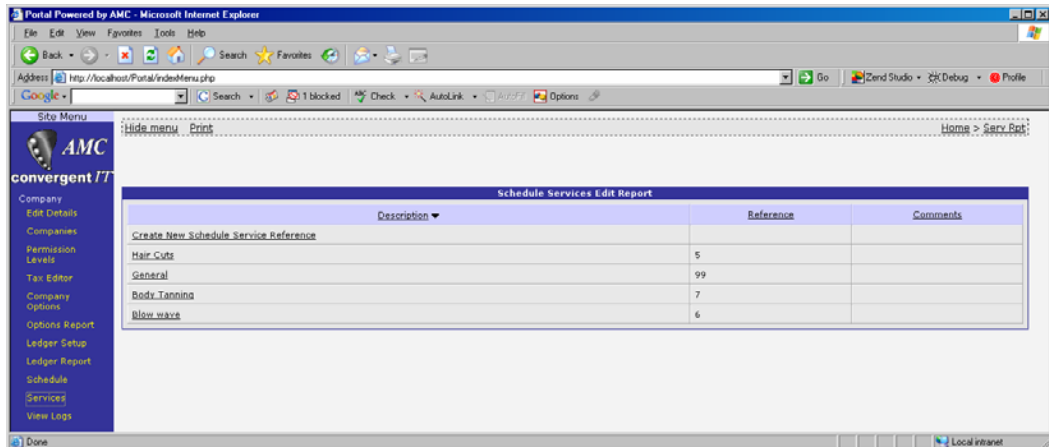
This report allows a quick view of the current 'Books'



Clicking on the 'Book' name will allow maintenance its details. The 'Book' id is limited to 1 character. The POS is limited to 8 'Books'.

4. Services

This is a report showing configured services



Clicking on the service name will allow maintenance on its details. Reference ID and description may be up to 50 characters in length

Maintenance

Purpose

To allow user updates, add or change Customer address or details. To add or delete Services and or 'Books' and to allocate employees to 'Books'

Maintenance Sections

The user may find the maintenance screens under the Company section for Services and 'Books' and under the Employee section for the assignment and reporting. The customer edit / new feature may be used to edit customers for Lay buys, Home Deliveries and Customer Orders and Appointments provided the options are subscribed to and enabled.

Navigation

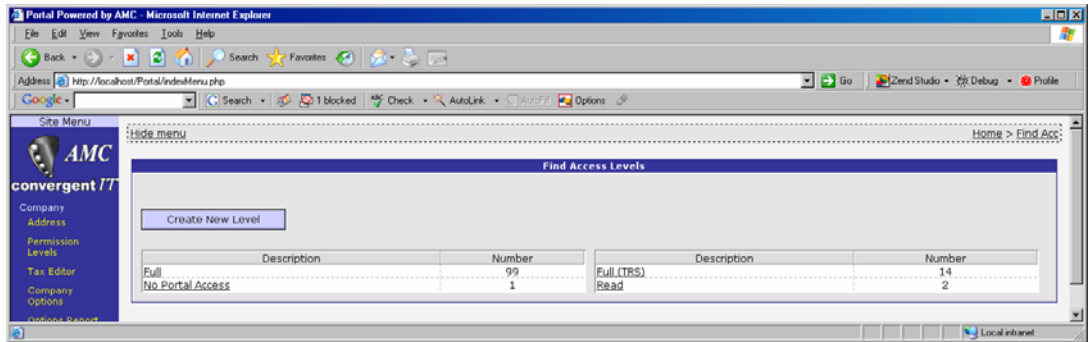
Selecting Multiple Rows

This option is not available in any of the related reports or edit screens

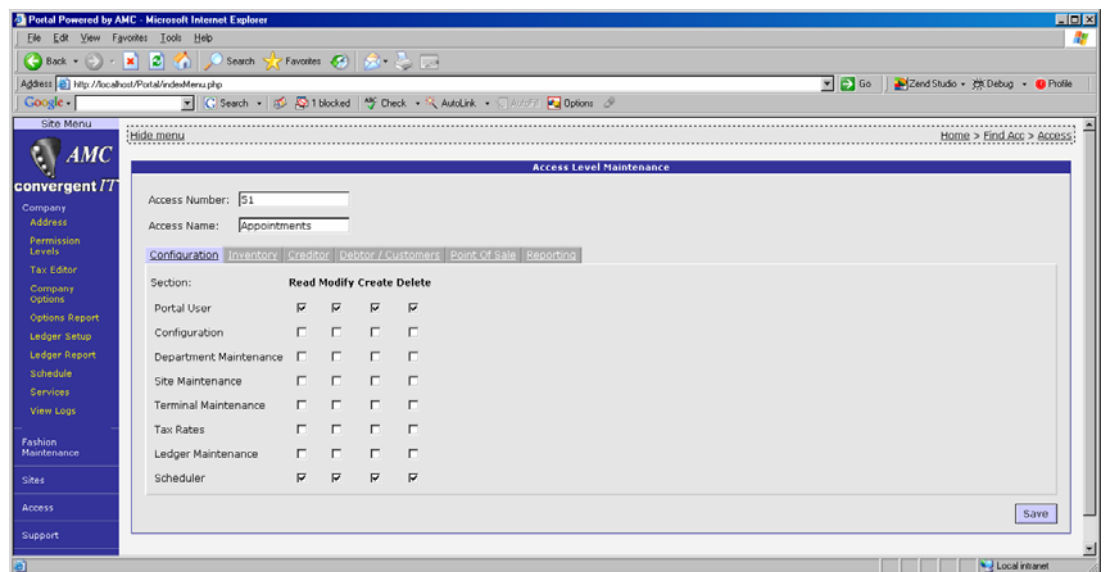
Security

Select the Site Menu via the side menu. Note, the name of the menu may be some other description as this is a soft option within the portal. Examples are Store Menu, Branch Menu etc

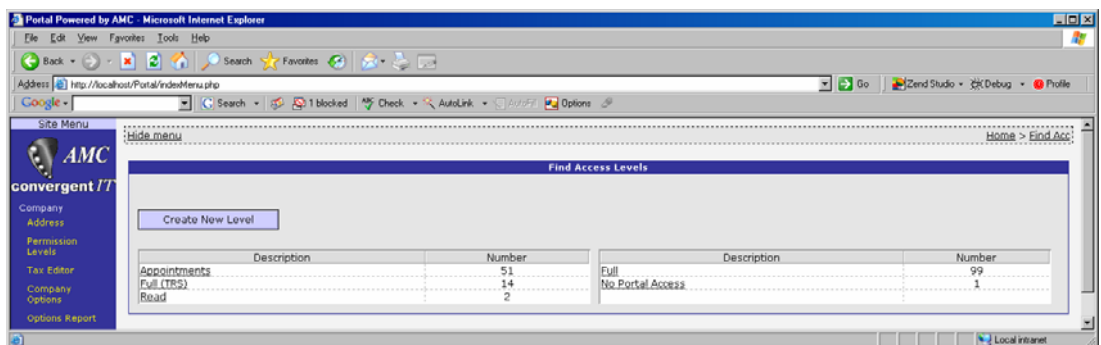
Click on 'Permission Levels'



If a Appointments exists, then *click* on it, else click on 'Create New Level' and create the required permissions level.

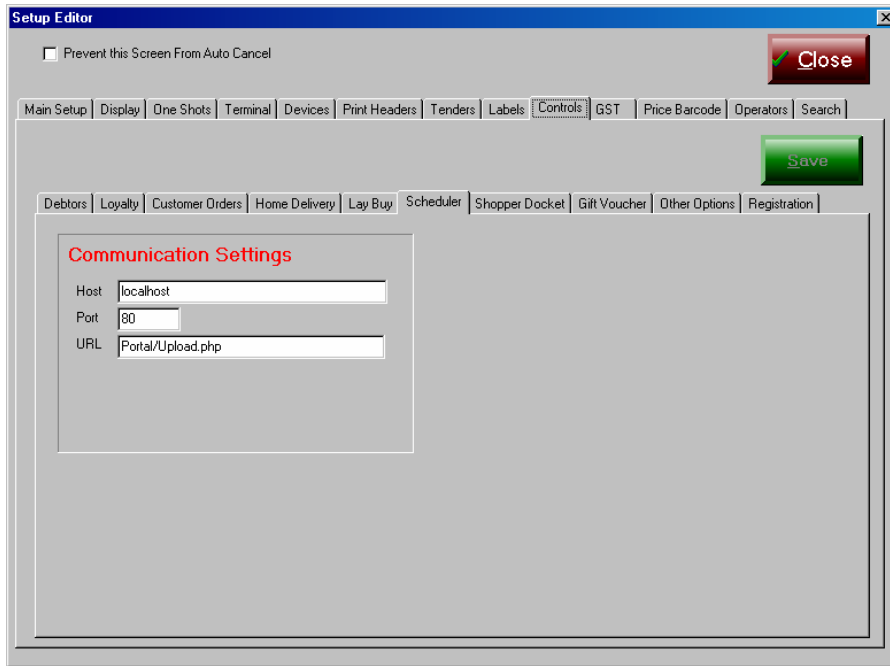


The user is required to have at least read permissions to run the reports and edit permission to change any of the settings or to add new Customers.



Setup

The POS setup area Appointments is via the standard 'Setup' method for all other POS settings. Click the 'Setup Edit' from the 'Functions' page and select the 'Controls' Tab.



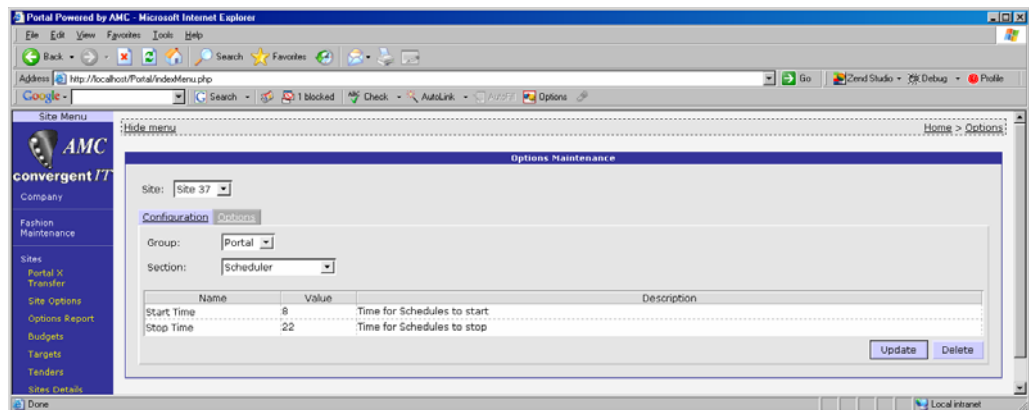
All other setting are via the Portal maintenance screens

Portal Setup

Two sections must be setup before any transactions may take place.

1. Settings

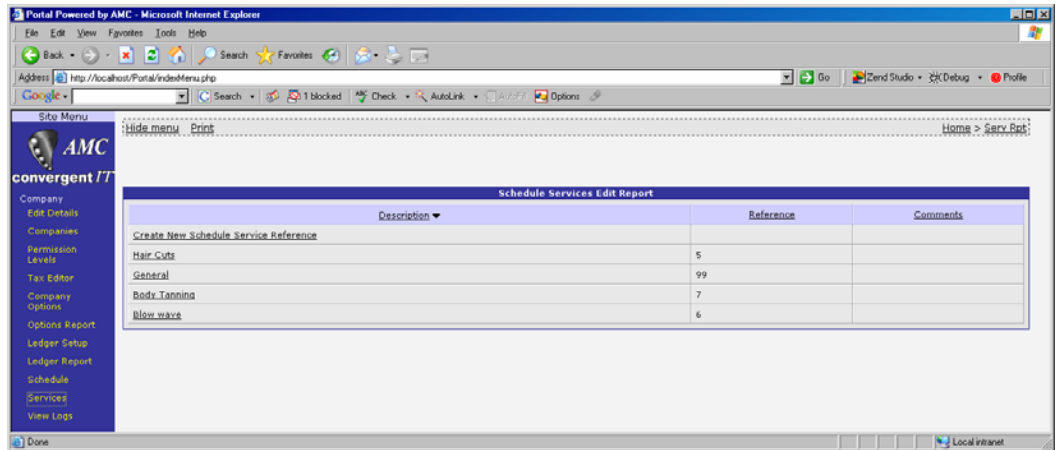
The Appointment books require a start Hour and End Hour. These are set up in the Site section under Site Options.



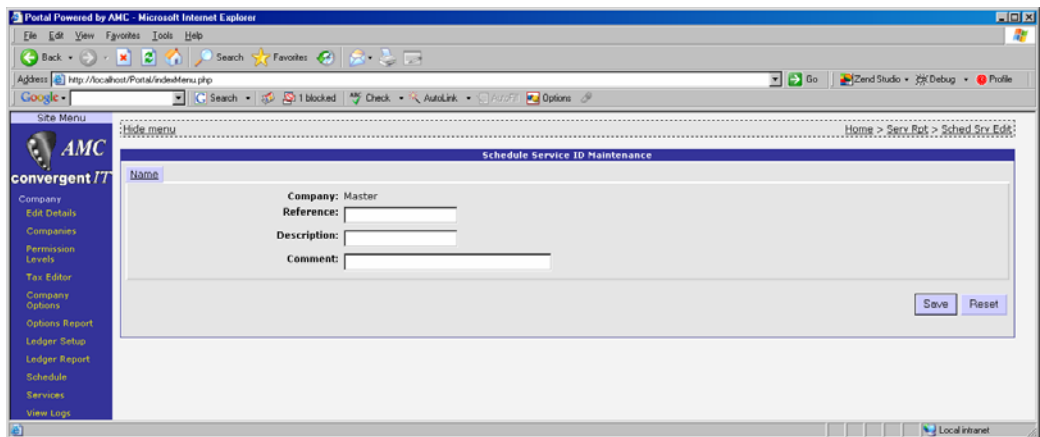
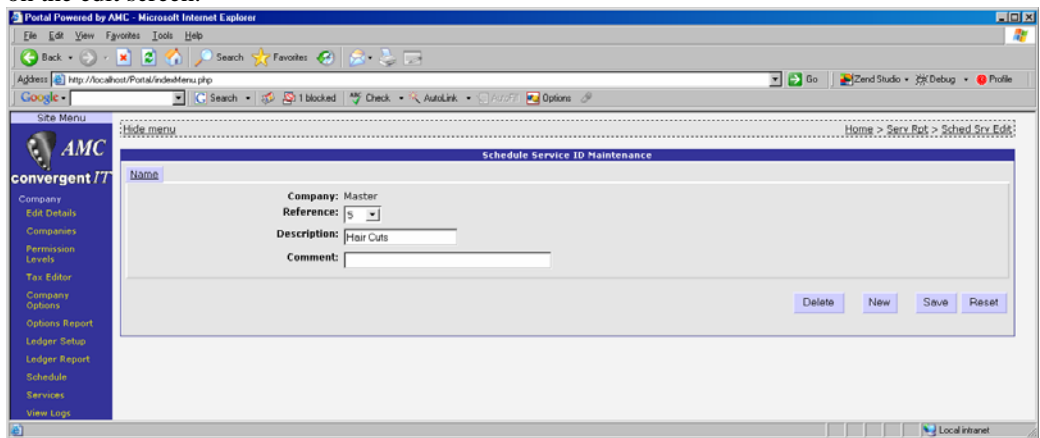
Each site may have its own start and end times.

2. Services

Services are company wide, and apply to all sites / stores. Creation or Editing is done within the Company section.



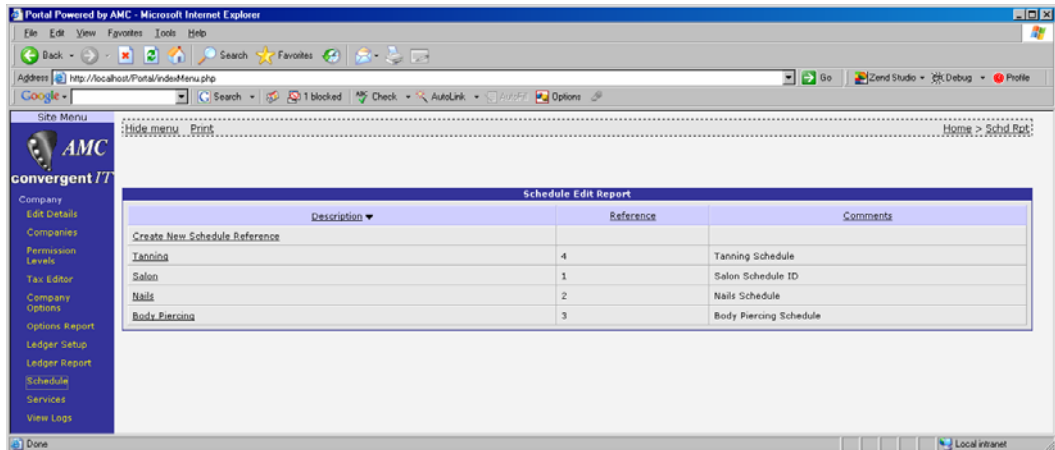
New services may be added by clicking on the 'Create' link, or by clicking on the 'New' button on the edit screen.



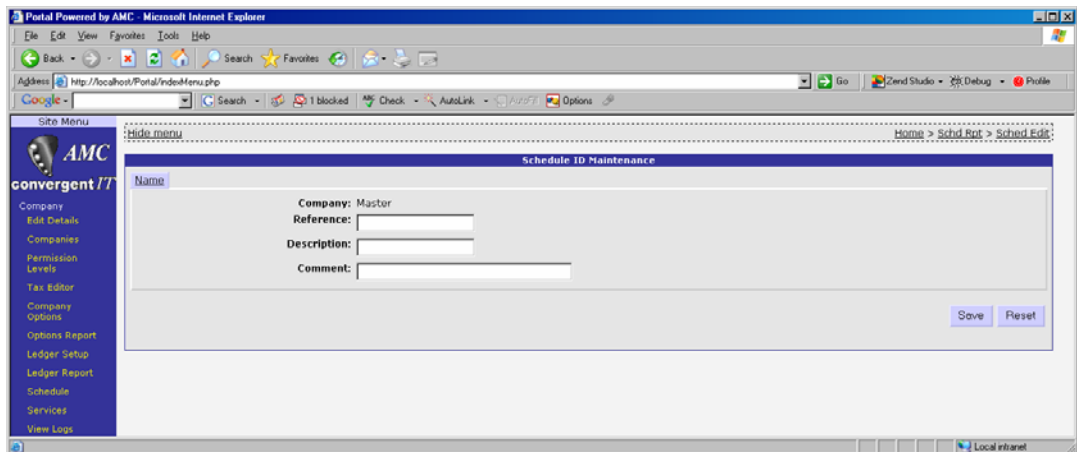
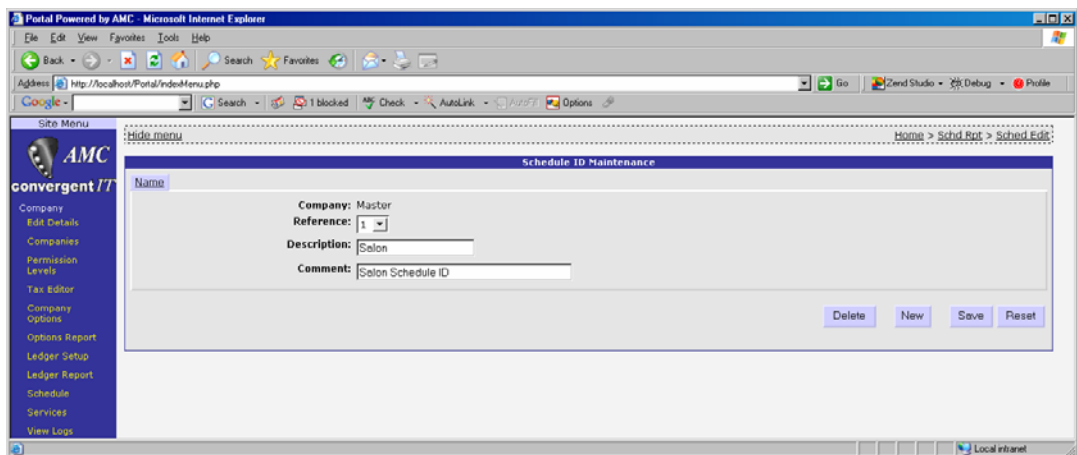
The reference ID may be up to 50 characters, but it is suggested that it be less than a nominal 10. The reference may be alphanumeric. The description may be up to 50 characters and the comment field up to 250.

3. Appointment Books

'Books' are company wide, and apply to all sites / stores. Creation or Editing is done within the Company section.



New 'Books' may be added by clicking on the 'Create' link, or by clicking on the 'New' button on the edit screen

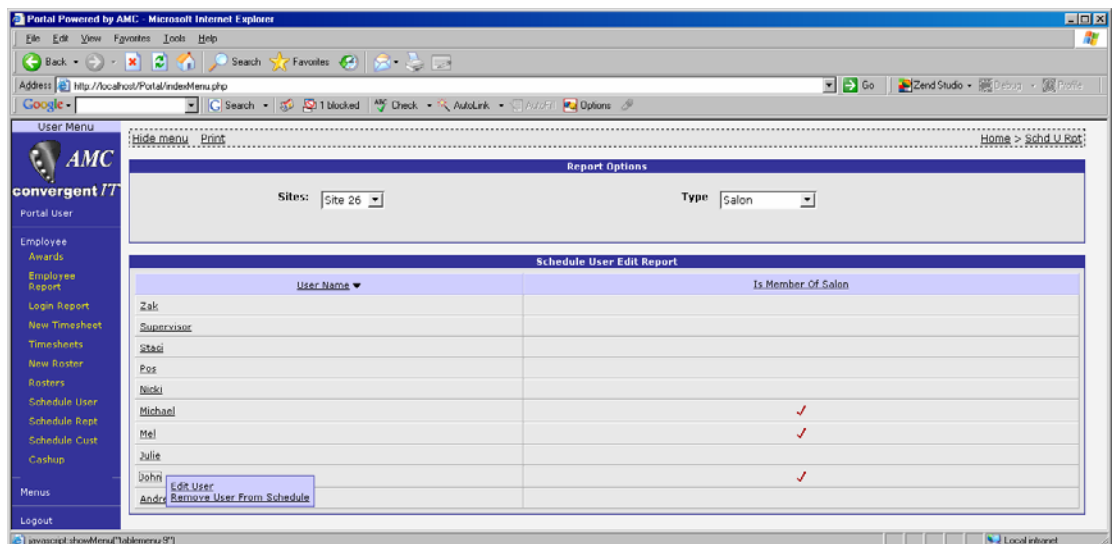
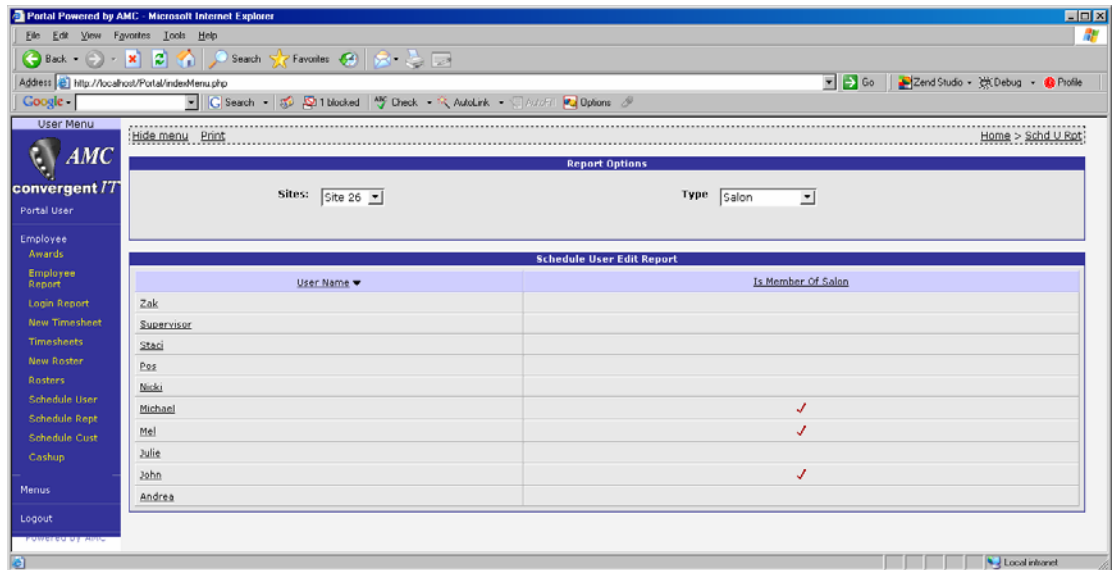


The Reference may only be a single alphanumeric character. The description may be up to 50 characters and the comment up to 250. There is a limitation of 8 books at the POS

4. Employee

Once the 'Books' and services have been set up, then employees may be assigned to the books on a site-by-site, book by book basis.

The edit screen / report may be found in the User section under Employee

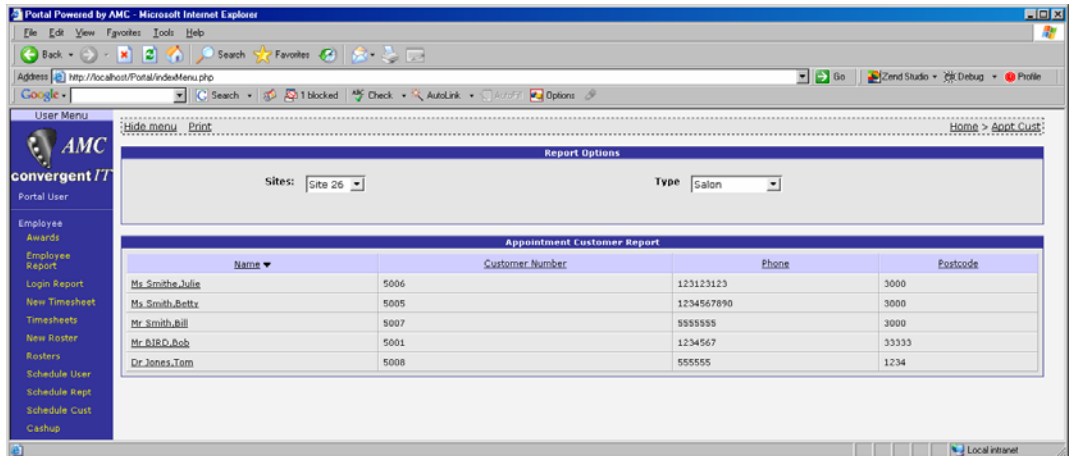


First a 'Book' is selected, in the above screen it Salon. Then the employees linked to that site can be allocated to the 'Book' or removed. Clicking the employee name will pop up two options. One of those will be to edit the employee, the other will be to add or to remove (depending on current allocation)

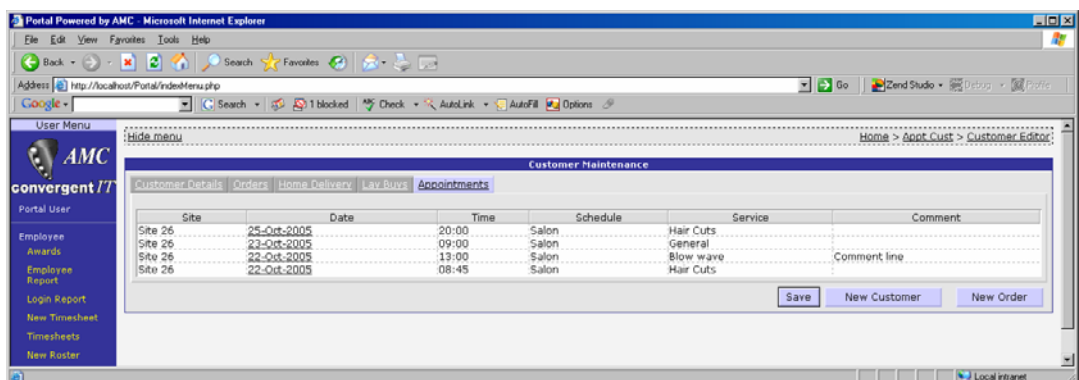
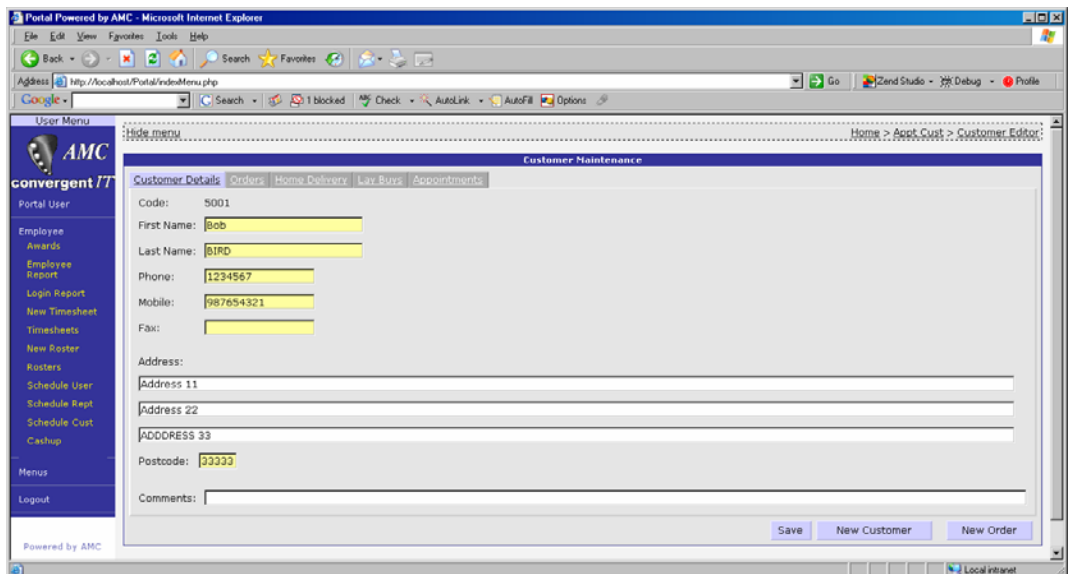
Once all three sections have been completed ('Book', Services and employees), the POS module can now start data entry.

5. Customers

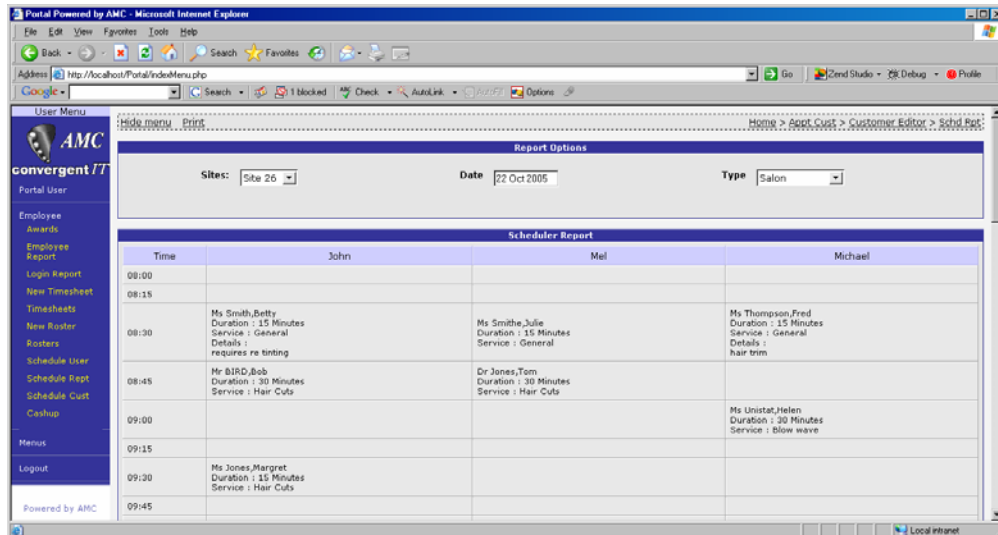
Customers may be added via any of lay Buys, Loyalty, Debtors, Home delivery, Customer Orders and by the POS using appointment books.



From the Customer report from use of the appointment books, the administrator may edit the customer details. These details may also be edited by the POS. Clicking on the customer name will allow the Portal edit screen to be used.



Clicking on the Appointments Tab will display all valid appointments. Click on the date of the appointment will take the user to the appointment day screen.

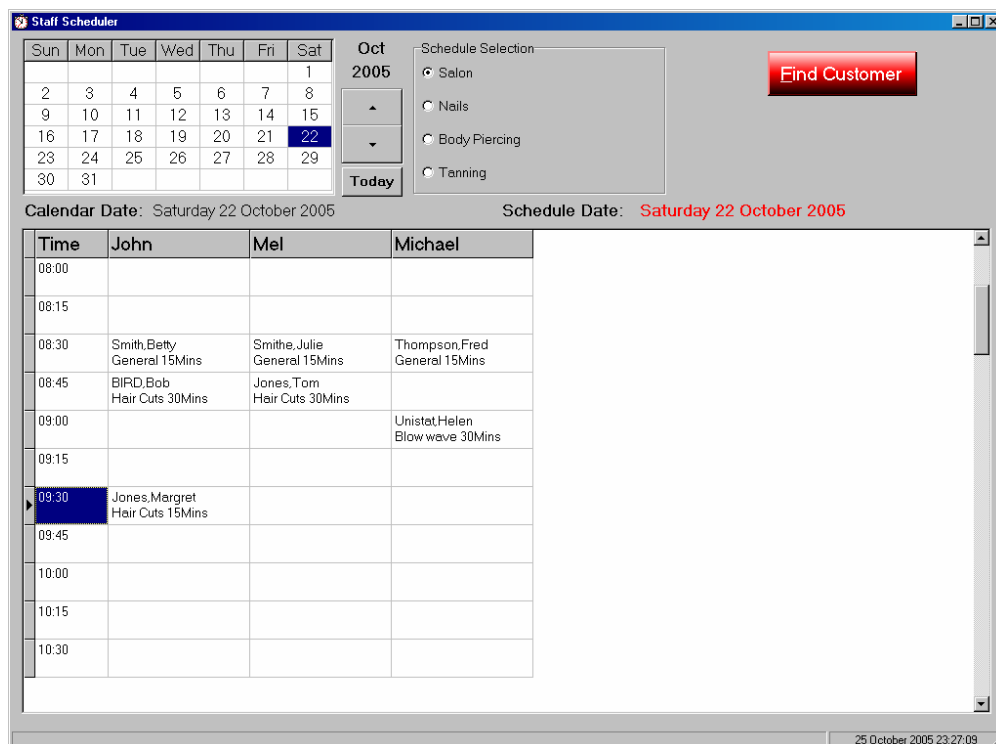


Data Entry

All data entry is via the POS screens

POS – Appointments

The employee navigates to the related day and time. The 'Books' available are downloaded to the application at 'start-up' time, along with the employee and services. To refresh these settings, just restart the application or double click on the status bar.



The user selects the date via the calendar. The system will then request the related data from the portal 2 seconds after the last calendar change. This will collect all booking for all books for the day

selected. The up / Down arrows allow the month to be increased or decreased. To select the current day, click 'Today'. The User display, is determined by the 'Book' selected (in this case Salon). Up to 12 Employees per book may be assigned (see portal maintenance). Double clicking on a customer name will show the full details of the booking. The day display is limited to Customer name, service and length of time in ¼ hour blocks.

Double Clicking on a Customer will allow the full details to be shown. The red indicators show blocks that have already been assigned. The yellow indicate this appointment. Increasing the block count will move the yellow indicator down one more block.

The details field may be up to 1000 characters. The comment field holds 250 characters. The Customer name and address can be updated by clicking the Update button. Cancel will close the screen with out changing the data, 'Save' sands the appointment to the Portal and updates the internal database. 'Delete' will delete the appointment.

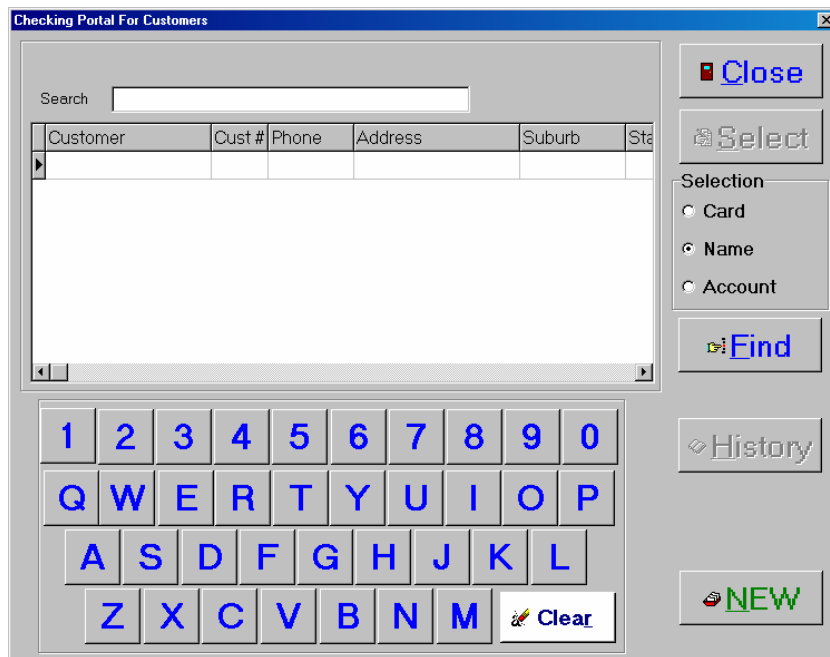
The 'Enter' key will insert a new line in to the details when the details are being edited. To delete or replace part of the detail information, select it via 'touch and drag' then 'hit' the new letter. Clear will delete the full field selected if non-selected or the selected text.

Change the 15 min block count if the customer needs more than the 15min block. The time of the appointment may be altered by double clicking the time bar to the left. The yellow bars will move according. The appointment will not be actually moved unless the 'Save' button is clicked and confirmed.

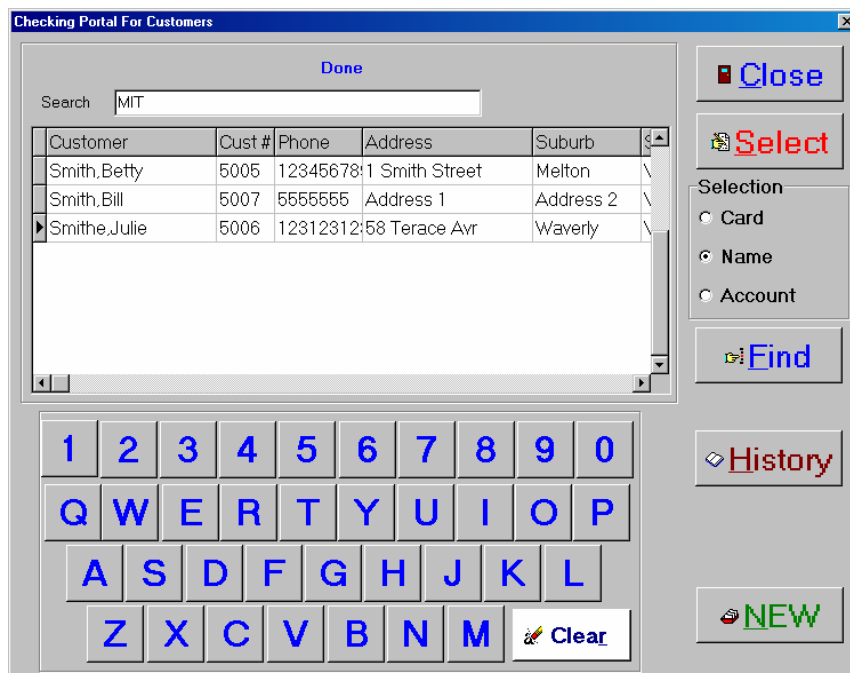
New Appointment

To open a new appointment, double click on the blank area of both the Time and Employee. If the date is not correct, first select the date and click update to move the Appointments to that date. The Up / Down arrows allow the month to be changed. The calendar shows a full month in one view.

When a blank 'Cell' is double clicked, a customer selection dialog will appear



If the customer is an existing customer from Loyalty, Customer orders, Debtors, Home delivery, Appointments, or Lay Buys, then type at least three letters of their name, account or card and click 'Find'. The system will return all matching sub string searches. Case is ignored.



The sub string may be any part of either the Surname or First Name.

'BET' will also find Betty Smith.

Highlight the required entry and click 'Select'

If the Customer is not found, or the operator knows that it is a new customer (always best to check to prevent duplicate customer entries), the click 'New'. The system will respond with another data entry screen.

New Customer

Ms First Name Julia

Surname Roberts

Address 10 Smith Street

Suburb Mt Isa

State Victoria

Post Code 3166

Phone # 1234 5567

Mobile Phone

Accept

Cancel

1 2 3 4 5 6 7 8 9 0

q w e r t y u i o p

a s d f g h j k l

z x c v b n m Shift

Clear

Fill in the details of the new customer. Clicking the 'Shift' key will allow both cases to be used. All fields except mobile Phone are required.

The system shows the next dialog either after the Accept of a 'New' customer or the selection of an existing customer.

Schedule / Booking Details for Michael

Ms First Name Julia

Surname Roberts

Address 10 Smith Street

Suburb Mt Isa

State Victoria

Post Code 3166

Phone # 1234 5567 Mobile Phone

Update

Save

Cancel

Delete

Swap

History

Service Blow wave Appointment Time 09:30 15Min Blocks 5

Comment

Details

1 2 3 4 5 6 7 8 9 0 Clear

Q W E R T Y U I O P

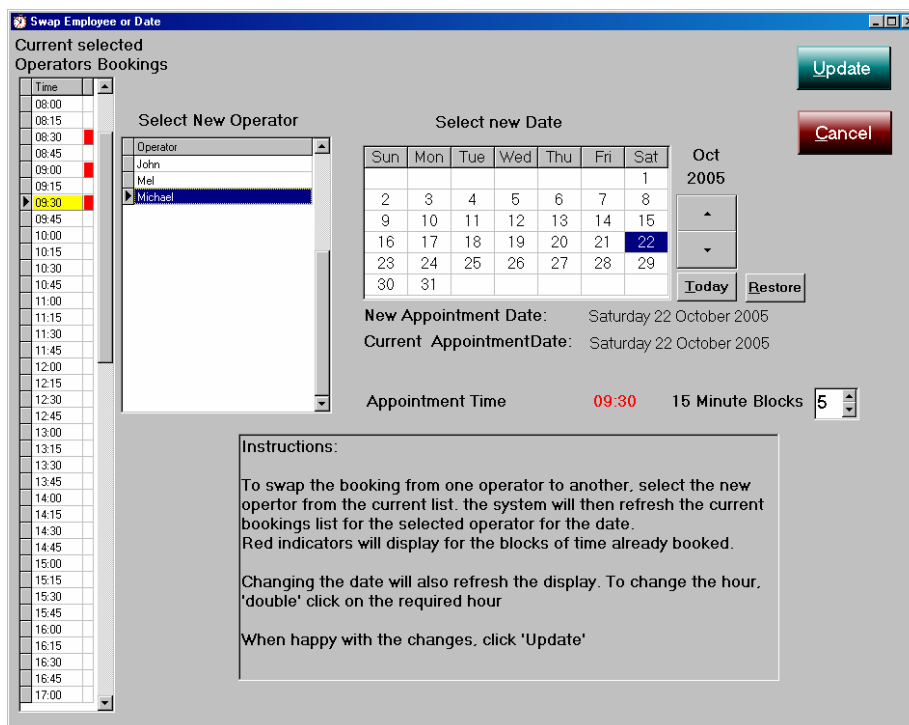
A S D F G H J K L Enter

Z X C V B N M , . / Shift

Set the required service, add comments, and fill out any details. If the customer name, address and or phone numbers are wrong, change them and click 'Update'. This will then update the portals database with the changes. Clicking 'Save' will update the appointment details both on the POS and the portal.

If it is wished that the day of the Appointment is to be changed or the employee with whom the appointment is made is to be swapped, then click on the 'Swap' button. This will allow one of four events

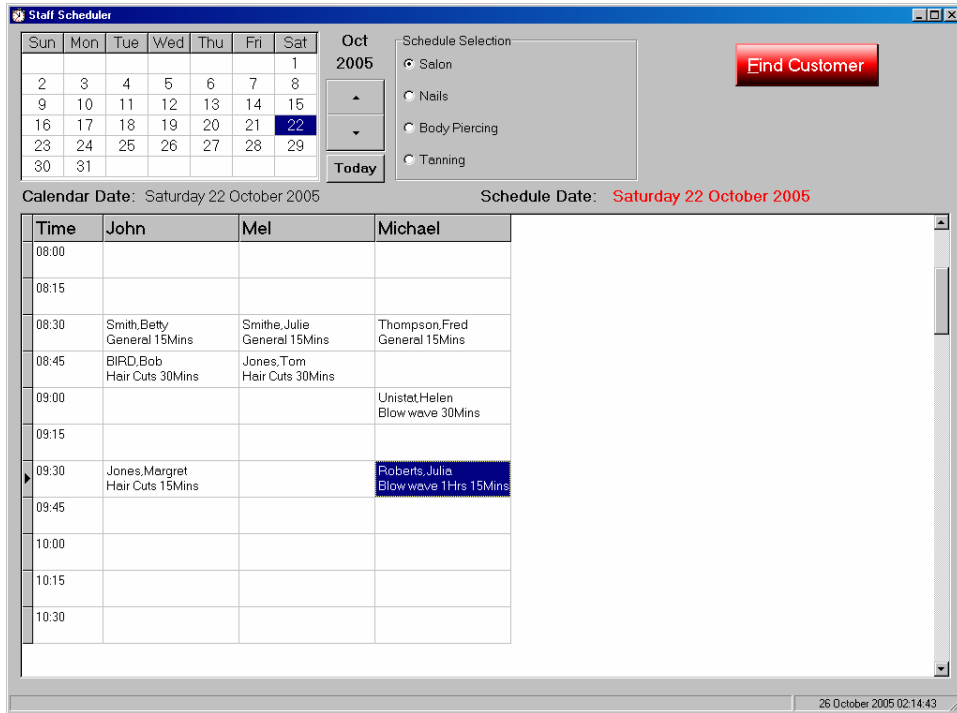
- a. Change of Employee
- b. Change of Date
- c. Change of Time
- d. Any of the above combination



To change the date of the appointment, click on the calendar. The month may be moved by clicking the up or down arrows. To restore back to original booking, click 'Restore'. To select current day as the booking click 'Today'.

Change the operator by clicking on one from the shown list. Each time the calendar or operator is changed, the system will refresh the bookings display, marking in red the current bookings as per the selections.

The appointment time may be changed via this screen by double clicking on the required booking time. When satisfied, click 'Update' and confirm. Changes may be discarded at any time by clicking 'Cancel'

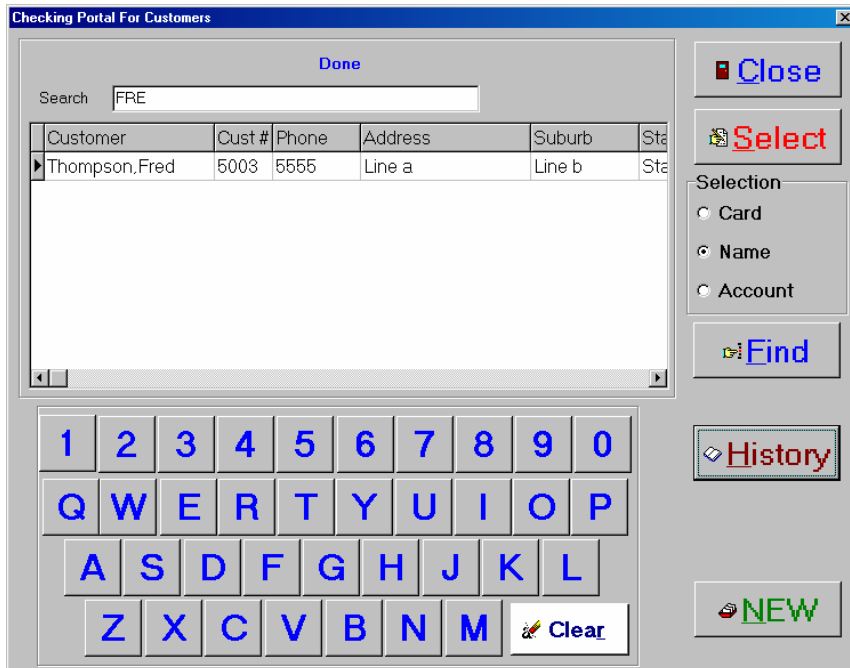


Customer History

Customer history may be shown by clicking the 'History' button after the customer has been selected. To open the customer history, click the 'Find Customer' button on the main screen, then find the customer through the normal means.

Highlight the customer and click on 'History'

Alternatively, the 'History' button may be clicked during the update of the booking details.



Schedule / Booking Details for John

Time: 08:00, 08:15, **08:30**, 08:45, 09:00, 09:15, 09:30, 09:45, 10:00, 10:15, 10:30, 10:45, 11:00, 11:15, 11:30, 11:45, 12:00, 12:15, 12:30, 12:45, 13:00, 13:15, 13:30, 13:45, 14:00, 14:15, 14:30, 14:45, 15:00, 15:15, 15:30, 15:45, 16:00, 16:15, 16:30, 16:45, 17:00, 17:15, 17:30, 17:45, 18:00

Ms | First Name: Betty | Update | Save

Surname: Smith | Cancel

Address: 1 Smith Street | History | Delete

Suburb: Melton | Swap

State: Victoria

Post Code: 3000

Phone #: 1234567890 | Mobile Phone: 0987654321

Service: General | Appointment Time: 08:30 | 15Min Blocks: 1

Comment: in a rush
requires re tinting

Details

1 2 3 4 5 6 7 8 9 0 | Clear

Q W E R T Y U I O P

A S D F G H J K L | Enter

Z X C V B N M , . / | Shift

The history sub system will then be shown where the operator may walk the history of the client

Customer History

Ms | First Name: Betty | Close

Surname: Smith

Address: 1 Smith Street

Suburb: Melton

State: Victoria

Post Code: 3000

Phone #: 1234567890 | Mobile Phone: 0987654321

Service: General

Comment: in a rush
requires re tinting

Details

Next (Up Arrow) | Last

Previous (Down Arrow)

Appoint Time: 22 October 2005 08:30

Navigation is via the Up / Down arrows and the 'Last' button.

Customer History

Ms First Name Betty

Surname Smith

Address 1 Smith Street

Suburb Melton

State Victoria

Post Code 3000

Phone # 1234567890 Mobile Phone 0987654321

Next

Previous

Close

Last

Service General

Comment Good customer
hair trim

Details

Appoint Time 22 October 2005 18:30

The system will indicate 'Record not Found' when there are no more records.

Customer History

Ms First Name

Surname

Address

Suburb

State

Post Code

Phone # Mobile Phone

Next

Previous

Close

Last

Service General

Comment

Details

Appoint Time Record Not Found